# Inquiring On and Saving Participants

As the TEAMS database grows, so does the number of duplicate clients. Spelling errors, nicknames, etc. can make it difficult to determine if a participant already exists on the system. Here are guidelines to reduce the chance of saving a duplicate client when using the **CLIR** (Client Inquiry/Registration) or **CLIM** (Client Inquiry/Maintenance) menus.

## GUIDELINES FOR INQUIRING ON CLIENTS

1) **An applicant may be on the system under a nickname.**

   For example, if an applicant's first name is Robert, you might enter just his first initial (R) during an inquiry. This broadens the search to catch Rob, Robby, etc. as well as Robert. If it is not found, you might also search for the initial B (for Bob, Bobby, etc.). Even though legal names should be used on the system, it's possible this rule was not followed in the past for the participant. Always ask the applicant if anyone listed on the application has ever gone by another name.

2) **Check your spelling very carefully.**

   If any letters are out of place, the system will not find the name you are looking for.

3) **Use the "Partial Name" field to help find surnames.**

   **Example 1:**  Enter the first four letters (minimum) of any surname and enter 'Y' in the PARTIAL NAME field to find all names beginning with those letters. This is very useful if you are not sure of the spelling.

   **Example 2:**  An applicant's name is John Stallings, but there is also a son named John on the application. You should use the Partial Name field to determine if either the father or son was previously saved as "Stallings Jr" or Stallings Sr" (suffixes should be entered in the Surname field). Therefore, typing STAL with "Partial Name" marked 'Y' would display Stallings, Stallings Jr, or Stallings Sr on the CLIS screen (along with other names beginning with "Stal").

   **Example 3:** An applicant has the hyphenated name Huntley-Briggs. You should inquire on all possible variations of this name. This is easily done with only two searches, using the Partial Name field: Partial Name HUNTLEY would find the person if previously saved as Huntley, Huntley Briggs, or Huntley-Briggs.  If not found, then Partial Name BRIGGS would find Briggs, Briggs Huntley, or Briggs-Huntley.

4) **For names with punctuation, search both WITH and WITHOUT the punctuation.**

   For example, if an applicant writes his or her surname as O'Riley, first inquire on O'RILEY. If not found on the system, inquire again on ORILEY and even O RILEY with a space between.

**5) For married female applicants, inquire on their maiden name, and on any previous married name as well.**

> **Reminder:** If a person is already known to TEAMS but is saved again as a new client, TEAMS will assign him/her a new Client ID number. This is more than a nuisance -- It defeats the ability of the system to establish and maintain each participant's assistance record.

## GUIDELINES FOR SAVING CLIENTS TO THE DATABASE

If you've determined to the best of your ability that an applicant is not on the TEAMS database, follow these naming conventions when you save them:

1) Save participants by their legal names.

2) For participants with common last names, the middle initial must be included.

3) For surnames with suffixes (Jr., Sr., III, etc.), enter the surname, a space, and the suffix (NO punctuation). *Example:* STALLINGS JR

4) If a participant normally writes his or her name with punctuation, save the primary name that way (*example:* O'RILEY). Then create an alias WITHOUT punctuation (ORILEY, with no apostrophe or space).

5) Enter the surname exactly the same way for all family members who share the name.

6) For unborn children, save the first name as the word "Unborn" plus the mother's first name (with no space). *Example:* UNBORNJULIE.

7) For clients who have only one name (like "Cher"), enter that name in the Surname field. In the First Name field, type NONE.

8) Many Asian names are written with the last name first. Save the client first with the names in the opposite order as American names (last, middle, first). Then create an alias in the same order as American names (first, middle, last).

9) Hyphenated last names (like "Huntley-Briggs"), or non-hyphenated multiple names (like "Love Hewitt"), must be entered entirely in the Surname field if there is enough room. It is also a good idea to store an alias in the opposite format (such as Love-Hewitt, with a hyphen).